## Introduction

This is a procedural tutorial that will give you step by step instructions on how to use this internet based Online Approvals system. It will cover login information, how to submit an approval and reporting options you have available. It is recommended that you bookmark this website on your computer for future accessibility.

Any approval that is an exception to the normal process and procedures will not be able to be submitted through this process and will need to be mailed to the Michigan Department of Education (MDE) – Office of Special Education and Early Intervention Services (OSE/EIS) for assessment of approval.

Login

The OSE/EIS Online Approvals (referred to as Approvals from here on) system is accessed through a web browser. In order to access the Online Approvals system, you will need to have a MEIS account. Once linked to the Approvals site, you will see a login screen (Figure 1.0) which will request your MEIS log-in name and password.
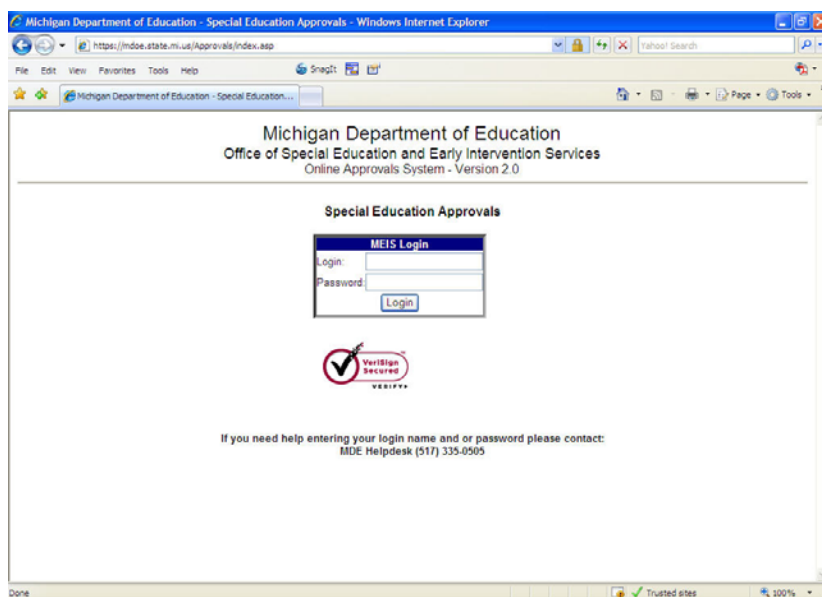
Figure 1.0

After you login, you will see the main menu (Figure 1.1) which lists the actions available to you. There will be five options, in addition to several items of information.
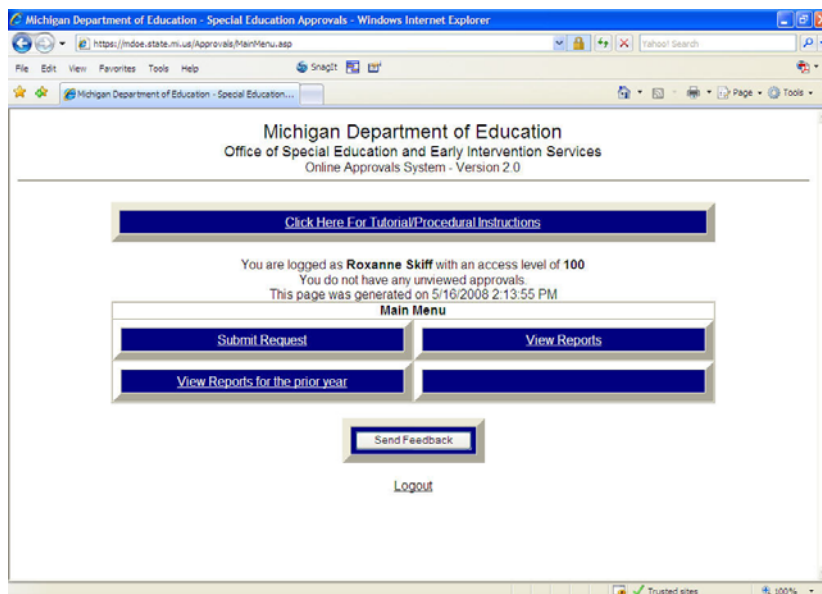

Figure 1.1

At the top of the main menu contains the link for the Tutorial/Procedural Instructions. The next line of information contains your current login name and access level. In Figure 1.1 the login name is shown as "Roxanne Skiff," with an access level of 100. This information will reflect your account, however, should an unusual situation or should problems arise, this information may change. If you are having problems, take note of what account and access level Approvals system is reporting to you, as they could be of use to support staff in diagnosing problems.

The second line indicates any unviewed approvals you may have. This would be applicable for teacher approvals that require payment before an approval may be granted. Once payment is received, the MDE grants the request, which is then listed as an unviewed approval. The numbers of requests granted by the MDE that have not yet been viewed are listed here. For more information, see the section in this document regarding making an approval request.

Approval Requests

a.) Submissions

The functions are grouped into two main areas: (1) submitting approval requests and (2) reporting. Submitting approval requests can be accessed through the choice on the main menu labeled "Submit Request." When selected, you will see a menu similar to Figure 2.0. This menu presents 4 color-coded choices. These choices represent the major groups for the

approval types available. There are 3 approval groups: Teacher, Administrator and Other. The fourth option, "All," lists all available choices from all 3 approval groups.
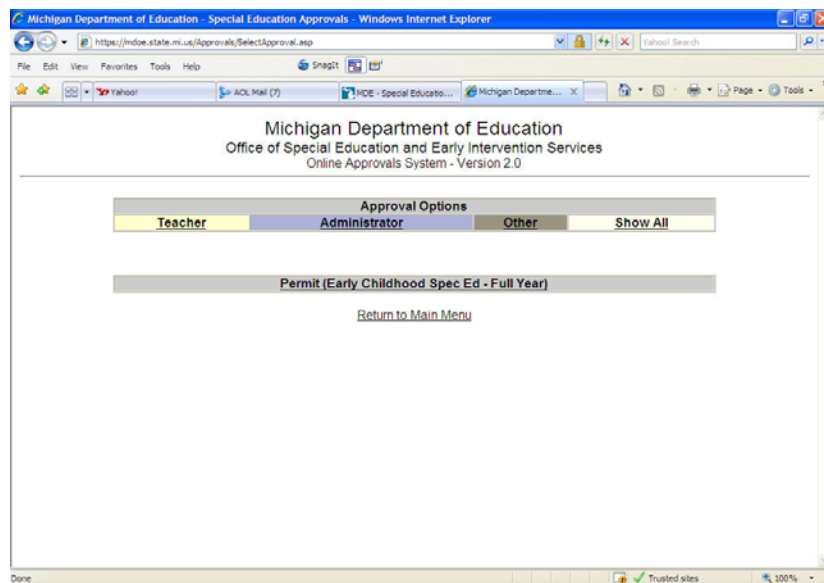

Figure 2.0

To submit an approval request, choose an approval category by clicking on one of the approval options. This will bring up a list of available approval forms in the selected category. Figure 2.1 shows the list of approval options available in the "Teacher" category.
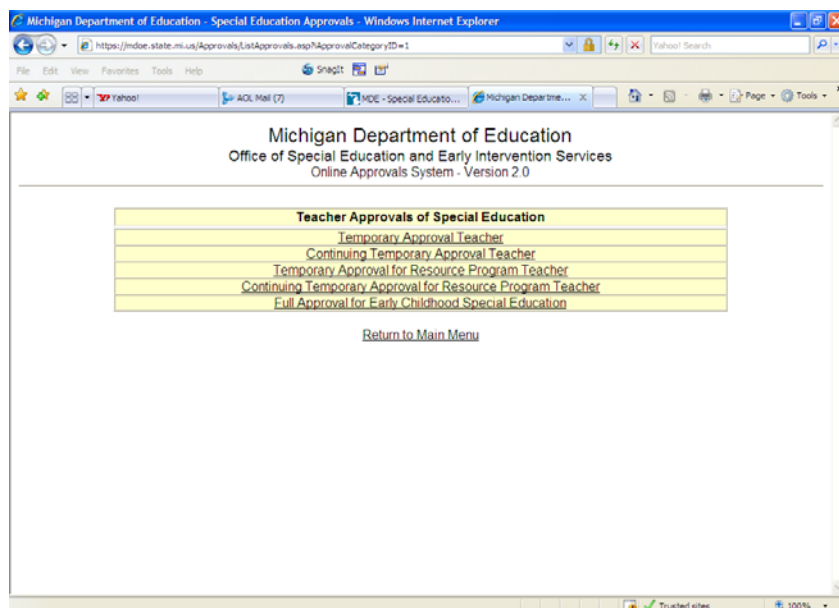

Figure 2.1

Select the approval form you wish to submit by clicking on its name. This brings up the blank form for you to complete. Figure 2.2 shows an example blank form, in this case, a "Temporary Approval Teacher" form.

Figure 2.2

Some of the forms are larger than others, and as such, you may not see the entire form on your screen. In this case, you may have to use the vertical scroll bar to move your view of the screen. If you navigate the form using the tab key, the form will scroll automatically as you move to an item that is not currently on the screen. Fill the form out as completely as possible. Please note that all fields, except "Candidate Middle Name" or "Initial" are required and you will not be allowed to proceed if you have not filled the form out sufficiently. Also, all of the criteria, which are checkboxes, are **required**. If the candidate does not meet one or more of those criteria, then this approval cannot be submitted electronically. The On-Line Approvals system will not accept submissions where all criteria are not met. In cases where a criteria is not met, or a field is not filled out or selected which is required, you will receive a warning message. An example of what the message appears as is shown in Figure 2.3
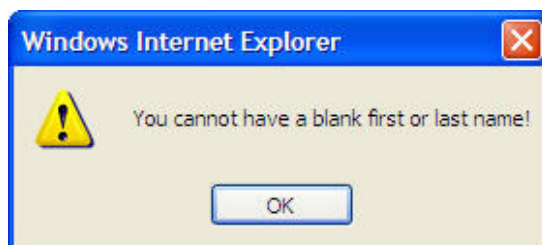

Figure 2.3

The appearance of the warning may vary slightly depending on your browser, but should look approximately like the sample warning in Figure 2.3.

Clicking the "Cancel this request" button will erase anything you have changed on the form, returning you to a blank form or you may return to the main menu without submitting the approval request by clicking on the "Return to Main Menu" link at the bottom of the form. Be aware that your changes are not saved if you do not submit a record. For example if you fill the form out, and then return to the Main Menu and then return to that form later, the information you entered previously will not be saved.

b.) Letters (Billing/Approval)

Once you have submitted a request, depending on the request, the system will automatically generate a billing letter and/or an approval letter depending upon the approval in PDF format, which should display on your screen (sometimes in a separate window). You should print the letter and forward copies of the letter to the appropriate persons, all who are listed in the cc (carbon copy) area at the bottom of the letter (e.g. local school district, candidate, ISD, etc.). However, if you do not print the letter out at this time, or the printed copy is lost, you can always find and reprint the approval using the "View Reports" function. See the section "View Reports" for more information.

View Reports

The other primary function of the On-Line Approval system is to provide access to your Intermediate School District (ISD) approval information. This includes things such as: submissions made in the current year, pending approvals, and granted approvals. Access to this information is in the form of reports. You can see what reports are available by selecting the "View Reports" option from the Main Menu. When you do, you will see a menu similar to Figure 3.0
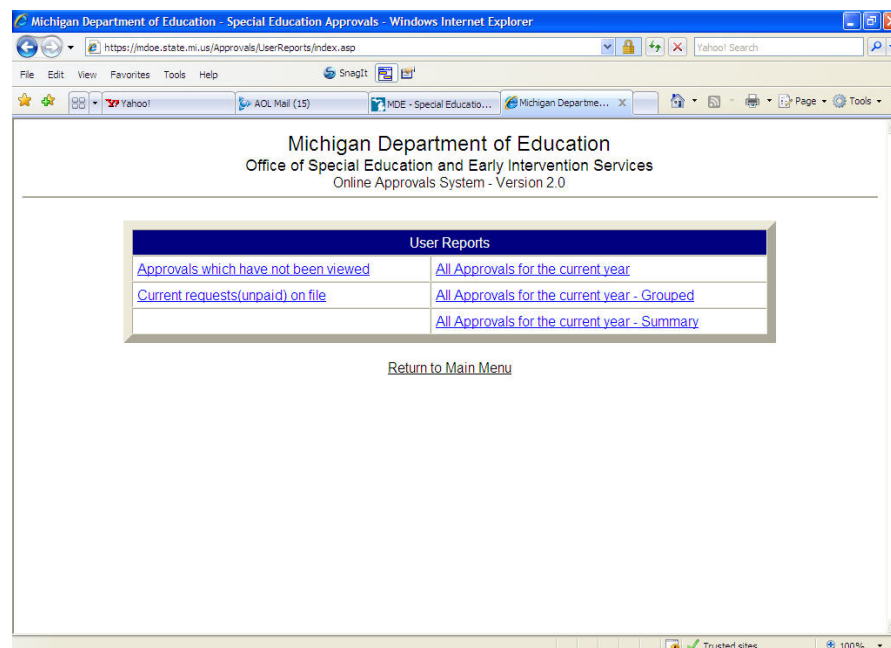
Figure 3.0

This will bring up the list of reports available to you. To see a report, simply click on it. There are currently 5 reports available to users:

- Approvals which have not been viewed
- Current requests (unpaid) on file
- All Approvals for the current year
- All Approvals for the current year – Grouped
- All Approvals for the current year – Summary

When you select a report, any items that match the criteria specified for that report are displayed. A report will appear similar to the one in Figure 3.1. Use the "View Reports" to find out the status of your approvals.

1. **Approvals which have not been viewed:**
   This selection will show you those requests for approval which have been granted by the MDE, but have not been viewed by the ISD. To view an approval, click on the approval in the report you wish to see. An approval letter will be displayed so that it can be printed out. Please notice that once you have looked at that report, it will no longer be listed in this report. You will need to look in the "All Approvals for the Current Year" report.

2. **Current requests (unpaid) on file:**
   This selection refers to approvals which have been requested, but have not yet been granted by the MDE. To view or print the billing letter and remittance statement for an approval request, click on the name of the candidate the request is for from this report. A PDF copy will be displayed which has the billing letter and remittance statement and can be printed at that time.

3. **All Approvals for the current year:**
   This selection displays a list of approvals, which have been granted by the MDE during the current school year. This report is unable to display approvals from previous years. To view or print an approval, click on the candidate's name that the approval is for. This will display a PDF copy with the approval information on it, which can then be printed. The online system is accessible for ISD submissions from August 1st through June 30th of each school year. After June 30th (End of Year) all submissions and printing of approval letters will be processed by the OSE/EIS.

4. **All Approvals for the current year – Grouped:**
   This selection displays a list of approvals, which have been granted by the MDE during the current school year. This report is unable to display approvals from previous years. The records in this report are grouped by Program Category/Approval Type or by Local Education Agency (LEA), with summary totals of these groups to the far right. Click the button displaying one of these groupings to switch the view. Click "View Summary" to link to the "All Approvals for the current year – Summary" report which removes the detail records from the report and displays summary totals. To view or print an approval from this view, click on the candidate's name that the approval is for. This will display a PDF copy with the approval information, which can then be printed.

5. **All Approvals for the current year — Summary:**
    This selection displays a summary of approvals, which have been granted by the MDE during the current school year. This report is unable to display approvals from previous years. The records in this report are grouped together by Program Category/Approval Type, then by LEA, with summary totals of these groupings to the far right. Click "View Details" to link to the "All Approvals for the current year — Grouped" report which inserts the detail records that the summary totals are based on.
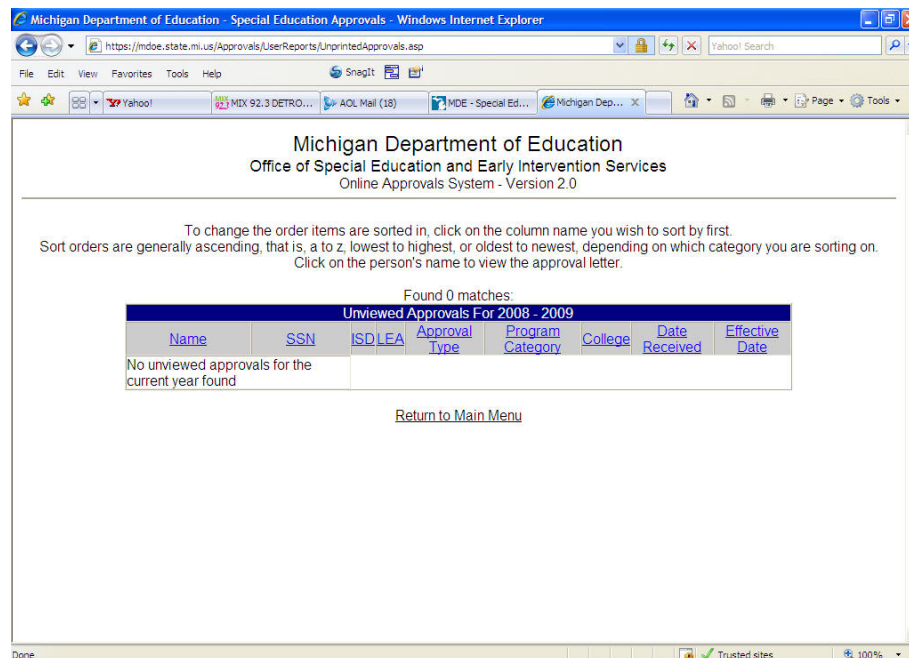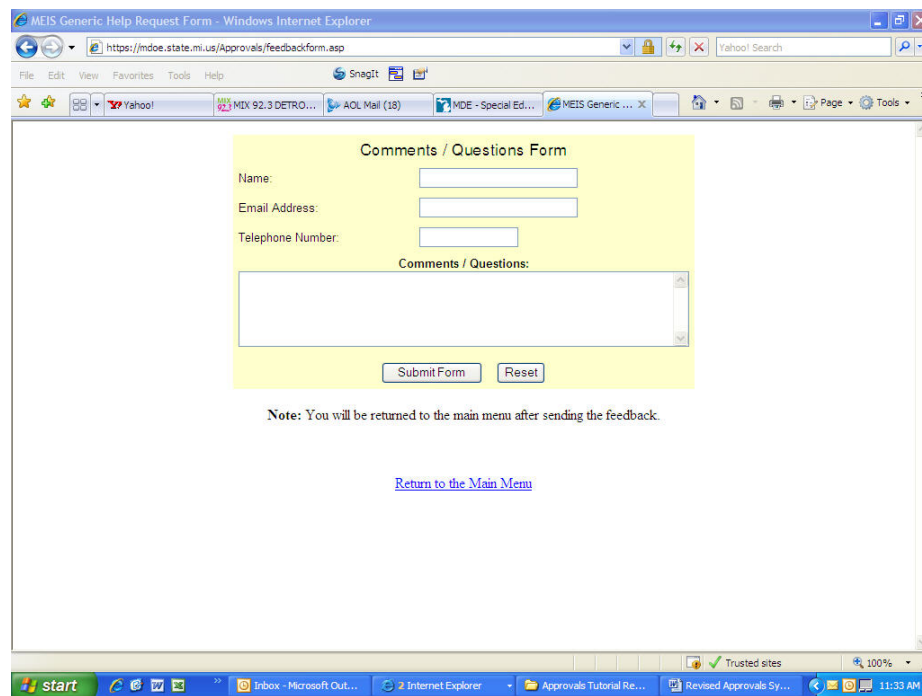
Figure 3.1

In Figure 3.1, no matching items were found. A key feature of the reports section allows you to sort the report according to any of the fields. You can select only one field as the primary sort item. To choose, click on the field name (in blue) which you wish to sort by. For example, to sort items by the effective date, you would click on the "Effective Date" column heading.

Feedback:

A web-based mechanism has been installed to allow for a more convenient method for users to send feedback. To send feedback, click on the "Feedback" button on the main menu. A form will be shown that you can fill out (Figure 4.0).
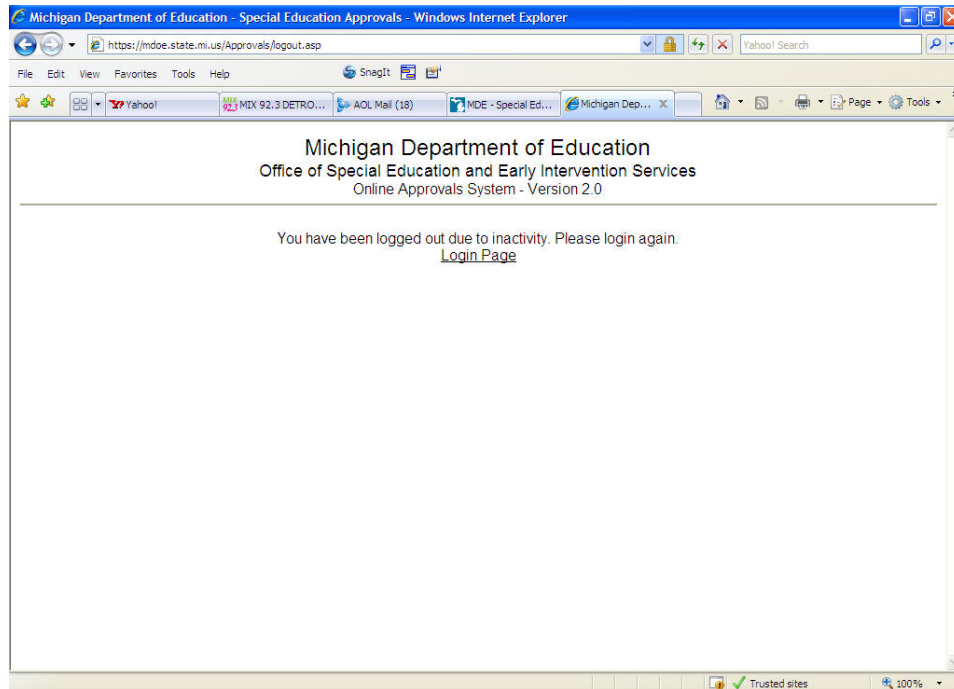

Figure 4.0

If you wish to have a response to the feedback, you will need to complete the contact information fields. Any feedback can be submitted through this form: problems, questions, complaints and/or compliments. Once you have filled in the form, click on "Submit Form." Your comments will be sent by email, and you will be returned to the Approvals Main Menu.

<u>Log Out</u>:
To logout of the system, simply click on the "Logout" link on the main menu. You will be logged out of the system and returned to the Login page. In addition, this system, for security reasons has some automatic logout features. After a period of no activity, you will be automatically logged out by the system. Please note, any work that was not submitted to the system before you were logged out is lost. In cases where this happens, your screen will automatically notify you of being logged out. Your browser will display the page in Figure 5.0.

Figure 5.0

If you wish to continue using the system, use the link "Login Page" to go through the login process again.

<u>Return to Main Menu</u>